

**STOCKBRIDGE-MUNSEE COMMUNITY  
REQUEST FOR PROPOSALS**

**ELDERLY CENTER  
PROJECT MANAGEMENT SERVICES  
BOWLER, WISCONSIN**

**February 4, 2015**

**I. INTRODUCTION**

The Stockbridge-Munsee Community (“Owner” or “Tribe”), a federally-recognized Indian tribe, is seeking proposals for a firm and/or individuals to act as a Project Monitor and provide project management services in relation to the construction of a new 7,200 square-foot elderly center building (“Project”). The services discussed under this Request for Proposals (“RFP”) will be provided on the Stockbridge-Munsee Indian Reservation, located in Shawano County, Wisconsin.

**II. SCHEDULE FOR PROPOSALS**

Sealed proposals for the services requested in the RFP **will be received until March 31, 2015 at 2:00 PM**, Central Daylight Time. Proposals shall be marked “Elderly Center” on the outside of the envelope. Proposals shall be delivered to the Stockbridge-Munsee Tribal Secretary, N8476 Moh He Con Nuck Road, P.O. Box 70, Bowler, WI 54416.

**III. PROJECT**

A. Description of Project. The Project is to construct a new elderly center that will provide a place for elders to receive daily meal service, socialize, attend educational health and safety events, register for benefits, produce craftwork and serve as a centralized hub of activity. The new elderly center is intended to replace the current facility that is located at N8651 Maplewood St., Bowler, WI 54416. The new facility is anticipated to use the same site as the current facility.

The new elderly center will be a 7,200 sq.ft., single-story building with an estimated Project budget of \$1.8 million. The building is anticipated to have slab on grade floor, wood framing and trusses, siding and stone accent with 6,600 sq.ft. of new construction. It is anticipated that 600 sq.ft. current facility will be retained and remodeled. There will be drop-off canopy at the main public entrance, as well as canopies over the secondary public entrance and the kitchen/delivery entrance. The building will have a reception area, a multi-purpose gathering space, a visiting space, office space, a kitchen, storage areas, 2 ADA-accessible bathrooms and 2 staff bathrooms. The Tribe intends to have the Project exceed federal accessibility standards and be built to energy-efficiency standards for sustainable living in green communities.

If the same site is used, the Tribe plans to relocate its elderly services operations to other locations while construction is being completed. While time will be of the essence to complete construction once the current facility is demolished, the timing of construction must also take into consideration disruption to the surrounding residents. The Project is on

a site that is adjacent to housing sites, including elderly housing. Construction of the Project must be scheduled and coordinated in a way that minimizes disruptions during the construction process.

B. Project Schedule. The Owner's goal is to hire an architect and complete design work in 2015, hire contractor in winter 2015, complete demolition work in winter/spring 2016, substantial completion of construction during 2016.

#### IV. SCOPE OF SERVICES

##### A. Owner's Objectives.

1. The successful bidder will be the Tribe's Project Monitor and provide project management services described in this RFP for the Project. The Tribe's Elderly Services Manager will be the primary point of contact for the Project Monitor.
2. The successful bidder will serve as contact for communication between the Tribe and its architect and contractor(s) in order to best coordinate services.
3. The successful bidder shall be responsible to ensure compliance with the Project schedule and budget.
4. The successful bidder will work with all parties to minimize disruption to residents in the surrounding area throughout the construction process.
5. The successful bidder shall be responsible to coordinate and manage the construction process including, but not limited to, the management of the procurement process and project budget, site coordination, administration of construction contracts, change order management, monitoring of day-to-day activities, inspections and quality assurance.
6. The successful bidder shall be responsible to prepare and maintain an Owner's decision log, which identifies issues or selections that require decision by Owner, including status of each item, decision on item and date of decision, in order to facilitate timely decision-making.
7. The Owner intends to use a purchasing system whereby it can directly purchase construction materials for contractors in order to take advantage of Owner's tax-exempt status. The successful bidder will be required to help manage that purchasing system.
8. The successful bidder will be responsible to assist Owner with completing required reporting for funding, including annual reports for HUD funding.

##### B. Planning and Design Phase Responsibilities. The Project Monitor will have responsibilities during the planning and design phases that include, but are not limited to, the following:

1. Review Project goals, objectives and constraints with Owner and provide recommendations on how they can be best achieved.

2. Oversee the procurement process for selection of an architect. Work with the Tribe's Legal Department in relation to the preparation of the architecture contract.
  3. Work with architect to complete design for facility that meets the Tribe's expectations and needs, within constraints of site.
  4. Represent the Tribe to ensure that Project serves the interests of the Tribe and permits the Tribe to effectively and efficiently operate an elderly center for years to come.
- C. Pre-Construction Responsibilities. Project Monitor will have pre-construction phase responsibilities that include, but are not limited to, the following:
1. Prepare and update a Project budget as necessary throughout construction. Evaluate and advise Owner about opportunities for savings.
  2. Develop and monitor a construction schedule for the Project.
  3. Oversee the procurement process for selection of a general contractor to complete construction work, including the development of bid specifications and bidding process. Work with the Tribe's Legal Department in relation to the preparation of the construction contract.
  4. Identify additional contracts required to complete construction work and assist Tribe with procurement process for such services.
  5. Monitor the general contractor's construction trade procurement process.
  6. Coordinate the submittal of all required insurance and related information required under construction contracts.
  7. Coordinate obtaining and distributing of documents for geotechnical and environmental reports. Review and coordinate addressing problems identified in such reports.
  8. Coordinate obtaining all required permits, including a tribal building permit. If the Owner is responsible for obtaining such permits directly, prepare permit applications for Owner's use.
  9. Examine the permitting and inspection processes applicable to the Project, advise the Owner in respect thereto as construction proceeds, and assist the Owner in complying with any obligations of the Owner in connection with the permitting and inspection processes. This Project is being completed by an Indian tribe on its reservation and is not subject to state/county inspections. However, the Owner intends to have the building meet or exceed state building codes.
- D. Construction Responsibilities. Project Monitor will have construction phase responsibilities that include, but are not limited to, the following:
1. Monitor and inspect all work in progress at least 2-3 times per week to ensure the quality of the work and compliance with the contract documents.

2. Manage and oversee construction trade contracts, including change orders, pay requests and lien releases.
3. Provide prompt written notice of deficiencies to responsible party and Owner. Make recommendations for corrective actions and ensure that correction actions are implemented.
4. Coordinate contractors' use of the site, particularly in regards to limiting disruptions to surrounding residents.
5. Review and process drawings, samples, and submittals.
6. Hold all necessary construction meetings for coordination of trades. Attend other construction meetings as appropriate and necessary.
7. Maintain cost accounting system to track Project costs.
8. Receive and review applications for payment, including all supporting documentation, and forward same to Owner with recommendation for action, including amount due, adjustments for work not completed, and any other bases for withholding payment.
9. Notify Owner and responsible contractors of any claims asserted by against Project and assist with resolution.
10. Assist Owner with coordinating and managing the direct purchase of construction materials by Owner to take advantage of Owner's tax-exempt status.
11. Review and process contractors' requests for changes in the work or claims in relation to the Project, provide recommendations to Owner and act on any direction provided by Owner.
12. Provide guidance and direction as needed regarding installation of owner-supplied materials, furniture and equipment.
13. Obtain services of independent inspector to conduct "municipal" type inspections since the State of Wisconsin and Shawano County does not have jurisdiction to perform such inspections and the Tribe does not have a building inspector.
14. Facilitate discussions between Owner and contractors to resolve disputes and make decisions.
15. Maintain construction records, including contracts, specifications, drawings, submittals, schedules, meeting minutes, directives, change orders, etc. Ensure that daily field reports on job-site conditions are maintained, including weather, construction activities, and any special occurrences. Maintain photographic records of construction activities.
16. Provide regular reports to the Owner, including information on schedule, budget, quality, safety, and general Project information. Written reports should be submitted once a month, or as otherwise determined necessary, and oral reports should be as needed.

17. Monitor contractors' safety programs to help ensure jobsite safety. Receive and review any reports of safety violations and reportable accidents or injuries.
  18. Receive and review any reports of hazardous material and provide recommendation to Owner regarding such material.
- E. Closeout and Post-Construction Responsibilities. Project Monitor will have closeout and post-construction phase responsibilities that include, but are not limited to, the following:
1. Coordinate construction close-out activities, including punch-list preparation, completion of deficiencies, submittal of close-out documents, and recommendations on the release of retainage amounts.
  2. Ensure Project site is clean, cleared of debris and equipment, and that there are no liens or encumbrances arising from the Project.
  3. Receive and review all documentation required from contractors to achieve final payment and final completion, including as-built plans, warranties, and operation and maintenance manuals.
  4. Coordinate any required commissioning.
  5. Review as-built drawings for accuracy and notify Owner of any errors in such drawings or errors that otherwise become known.
  6. Make final inspection and provide certification that, to the best of their professional knowledge, the building conforms to the approved plans, specifications, and shop drawings.
  7. Submit all Project documentation to Owner in organized and useable form.
  8. Participate and assist Owner in any dispute resolution proceedings regarding the Project.
  9. Conduct follow-up inspections of the Project at 6-months and 12-months after construction is completed.
- E. Conditions. The following conditions must be adhered to by Project Monitor when performing services under this Project.
1. Adherence to applicable Tribal, state, and local laws covering the work performed and compliance with such requirements. The construction shall at least meet State of Wisconsin building codes.
  2. The bidder must supply all materials and personnel required to perform work.
  3. Ensure that every precaution must be taken to protect the safety of the tribal community, as well as the integrity of the Tribe's operations.
  4. General liability, worker's compensation, and vehicle insurance must be provided at bidder's own cost, naming the Stockbridge-Munsee Community as an additional insured on liability coverage, in amounts that meet state

standards. Certificates must be on file prior to the start of any work and policies provided on request.

5. Owner must approve any subcontractors and subconsultants. Insurance must be provided for any subcontractors and subconsultants while they are on a Project site.
6. The Project is being constructed on tribal trust land so that the bidder has no lien rights.
7. If successful, the bidder will be prohibited from taking on any other role or responsibility with respect to the Project covered by this proposal, which would conflict with or undermine their primary responsibility to represent the interests of the Owner on the Project.

## V. PROPOSAL REQUIREMENTS

### A. Proposals shall include the following elements:

1. Proposals shall identify the fee for these services. Such fee may be based on a sum per each phase of work or may be on an hourly basis with a not-to-exceed cap per phase.
2. Proposals shall specify proposed reimbursable costs in detail, including a total estimated cost for reimbursable expenses.
3. Proposals shall identify the staffing plan for the Project and key personnel, including a contact person and on-site personnel.
4. Proposals shall include a brief description of the bidder's approach toward and working method for providing the project management services identified in this RFP.
5. Proposals shall identify the bidder's qualifications for this work.
6. Proposals shall identify the nature of any potential conflict of interest the bidder might have in providing services for the Tribe and any current litigation in which the bidder is a named party.

### B. Proposals that do not include all the requested information shall be deemed non-responsive and subject to rejection.

### C. Any questions concerning this RFP shall be forwarded, in writing, by e-mail, fax or mail, as follows:

Stockbridge-Munsee Tribal Council Secretary  
N8476 Moh He Con Nuck Road  
P.O. Box 70  
Bowler, WI 54416  
Telephone: 715-793-4387      Fax: 715-793-1307

### D. Any responses issued will be provided to all proposers who have submitted a notice of intent to propose.

## VI. ADDITIONAL INFORMATION

- A. The successful bidder will be required to enter into a written contract with the Tribe in relation to these services. An example of this contract may be provided upon request. The Owner does not intend to grant a limited waiver of its sovereign immunity as part of any contract to provide services under this RFP.
- B. This RFP does not commit the Tribe to award a contract, pay any costs associated with the preparation and presentation of a proposal, or procure or contract for services of any kind whatsoever.
- C. The Tribe reserves the right to revise the evaluation and selection process without notice and in its sole discretion, to accept or reject any or all bids, to negotiate with any or all bidders or to cancel the RFP in whole or in part.
- D. The Tribe reserves the right to request additional information from any or all bidders.
- E. Bidders may be required to participate in negotiations and to submit any price, technical or other revisions to its proposal that may result from such negotiations.
- F. All materials submitted in response to this RFP will become the sole property of the Tribe and will not be returned.
- G. Should the Tribe be unsuccessful in negotiating a contract with the selected bidder within an acceptable time frame, the Tribe reserves the right to begin contract negotiations with another respondent to the RFP.
- H. The Tribe may waive informalities or irregularities in a proposal.
- I. The successful bidder will be fully responsible for errors and omissions of any subcontractors and subconsultants used for the work.
- J. By submitting a bid, bidders warrant that they have not and will not engage in conduct that violates federal law or tribal law prohibiting conflicts of interest, gratuities or gifts between contractors and tribal officers and employees involved in the award or administration of contracts.
- K. The successful bidder must agree to provide the Tribe with audit access on request during the term of the contract and for seven years thereafter.
- L. This Project is for work on an elderly center in an area that is in proximity to elders, as well as children. The Tribe reserves the right to deny access to any individuals who it deems may be a danger to the tribal community.

\*\*\*\*\* END OF DOCUMENT \*\*\*\*\*